



CHAPTER LEADERSHIP TOOLKIT

Empowering volunteer leaders with the tools they need to succeed

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Toolkits offer consistency, critical for organizational success. Consistency means stronger engagement with members and prospects and tools that make boards and committees more effective, streamlining, standardizing, and minimizing the time it takes to get things done.
- 2 Events**

Countless factors affect the success or failure of your meetings, conferences, and outreach programs, including format, logistics, and even vendors. Get it right, and members and guests are thrilled. Get it wrong, and you could lose them.
- 3 Membership**

Without a strong membership engagement plan, potential members and even some existing ones, can become frustrated with the way you operate. When this happens, they often get their needs met by another organization.
- 4 Chapter Finances**

When treasurers get the direction they need, you get a robust picture of how well you're meeting financial responsibilities and reporting requirements. Everyone wins when chapter finances are in good order and member value is at the forefront of financial decision-making.
- 5 Marketing and Communications**

Each missed email deadline, each outdated web page, each time important news and education isn't shared, members and prospects suffer. Guidance and tools let you better plan, develop, and deliver chapter content that augments the national messaging.
- 6 Board Transitions**

Leadership changes happen, because of term limits, changes in priority, and/or an overload in work that causes burnout. A smooth transition from one leader to the next is crucial for the success and survival of a chapter.
- 7 Conclusion**

StarChapter is your resource for chapter leadership best practices. If you'd like to see more send suggestions to marketing@starchapter.com.

INTRO

When you need assistance connecting with members and prospects or getting new committee heads and board members up-to-speed, how quickly can you respond? Are your answers the same for each person you speak to?

This toolkit provides the consistency you need to better engage with members and prospects and give the board and committees the tools to more effectively run their chapter. You'll streamline and standardize forms, processes, and procedures, while ultimately minimizing the time it takes to get things done.

Included are templates for the following areas:

- Membership
- Chapter Finances
- Events
- Marketing and Communications
- Board Transitions

The templates are PDFs with fillable fields, which makes them easy to use. They can also be emailed and printed as needed.

These tools will help you be more successful when it comes to:

- Planning your year
- Serving members
- Developing leadership
- Improving finances
- Marketing to better promote chapters and the organization as a whole

As board members, you are probably using versions of these processes in your work lives. Using them at the chapter level can have the same positive impact, allowing you to be more strategic and better understand and connect with members, all of which can improve return on investment as well as the overall outcomes of both chapter and organization.

EVENTS

Monthly meetings, conferences, and outreach are standard activities for most organizations at both the national and chapter levels.

Countless factors can affect the success or failure of these events, including:

- Location
- Meeting format
- Cost (for venue and cost to attendees)
- Time of day
- Vendors

Get it right, and members and guests are thrilled. They return, they join, and they bring guests. Get it wrong, or don't give them exactly what they're looking for, and they could look to get their needs met by another organization.

Here's a simple example. Are your chapter meetings always in the same venue? That's not uncommon - it's easy.

But...using the same location repeatedly can also bore attendees and make them lose interest. Rotating locations can provide the variety they need to keep coming back. This geographic diversity is helpful especially if your membership spans a large area.

Events are run by volunteers, so unless one of them has a day job as an event planner, there's a good chance they could use guidance on what makes a successful event. This section provides the direction they need to plan and execute all types of events. They'll find information related to:

- Event types
- Attendance management
- Collecting feedback
- Event planning

Planning events is time-consuming. And, the time is only worth it if attendees show up. If your members don't come to events, or they show up but don't enjoy the experience, they may stay home the next time - impeding the success of the chapter and ultimately, the national organization.

1. EVENT TRACKER

https://www.starchapter.com/downloads/event_tracker.pdf

2. EVENT PLANNING CHECKLIST

https://www.starchapter.com/downloads/event_planning_checklist.pdf

3. BADGE TEMPLATES

https://www.starchapter.com/downloads/badge_templates.pdf

4. SAMPLE SURVEY

https://www.starchapter.com/downloads/sample_survey.pdf

MEMBERSHIP

A guest at a meeting considers joining your organization to make connections and to network, hoping to meet locals in his profession and continue to develop his career. You may think your membership processes and procedures are “fine,” but is “fine” good enough?

How can you be sure you’re doing all you need to do to bring in new members who will stay for the long term? Without a strong membership engagement plan, potential members, as well as existing ones, can experience roadblocks, like difficulty registering for meetings or finding a contact for questions, and a lack of follow up from the chapter after joining. When this happens, they don’t often try again, which is a loss at all levels.

Included here are forms and processes to improve how you bring on new members and track the ones you have. And if you need help standardizing mentorship and volunteer practices, that’s here, too.

- New members
- Current members
- Mentorships
- Volunteers

1. NEW MEMBERS

https://www.starchapter.com/downloads/new_members.pdf

2. MEMBER ENGAGEMENT

https://www.starchapter.com/downloads/member_engagement.pdf

3. MENTORSHIP PROGRAM

https://www.starchapter.com/downloads/mentorship_program.pdf

4. VOLUNTEERING INTEREST FORM

https://www.starchapter.com/downloads/volunteering_interest_form.df

5. VOLUNTEER TIMELOG

https://www.starchapter.com/downloads/volunteer_timelog.pdf

CHAPTER FINANCES

Chapters need treasurers who are willing and able to provide appropriate financial leadership and money management. Your chapter's money is well-managed, right? Definitely? Maybe? Could be? Let's evaluate if your chapter's money is well managed.

Treasurers must have a combination of financial knowledge, planning expertise, and communication skills. How does yours measure up? Does he or she have the right background, or are they in their roles because there was no one else? If it's the latter, they're doing the best they can, and there's a good chance they may not understand what needs to be done and how to do it.

Maybe they need insight into tracking and managing their: budgets and their expenses, their sponsor program, including who the sponsors are and how much they've given to date, or the reporting they have to send to national. We also recommend the services of an accountant to help prepare the chapter's taxes. This section will provide the necessary direction to see how well they're meeting their financial responsibilities and reporting requirements. Here you'll find content related to:

- Annual budgets
- Sponsorships

Everyone wins when chapter finances are kept in good order and member value is at the forefront of the financial decisions being made.

1. ANNUAL BUDGET TEMPLATE

https://www.starchapter.com/downloads/annual_budget_template.xlsx

2. SETTING UP A SPONSORSHIP PROGRAM

https://www.starchapter.com/downloads/sponsorship_program.pdf

MARKETING & COMMUNICATIONS

Each missed email deadline, each outdated web page, each time you forget to share important news and education, members and prospects suffer. You need the guidance and tools to plan, develop, and deliver strong effective content that augments the organization's national messaging – they should mirror each other as closely as possible, outside of the details specific to a chapter or an event.

This section can help you take care of the basics, like creating a chapter marketing plan and developing social media strategies.

It will also help clarify what you plan to accomplish in the coming year, a critical activity that needs to be completed before you consider how to get the information out. There's also guidance for developing content and a sample content plan for engaging members and prospects regularly.

- Marketing plan
- Social media
- Monthly marketing/calendar

1. MARKETING PLAN TEMPLATE

https://www.starchapter.com/downloads/marketing_plan_template.pdf

2. SOCIAL MEDIA BEST PRACTICES

https://www.starchapter.com/downloads/social_media_best_practices.pdf

3. MONTHLY MARKETING CALENDAR

https://www.starchapter.com/downloads/monthly_marketing_calendar.pdf

BOARD TRANSITIONS

Chapter leaders have big jobs. They determine the strategic direction at the local level, oversee organization of annual events and year-round meetings, communicate to the members, attempt to get more people to join and renew, etc.

Leadership changes happen. They come as a result of term limits, changes in priority, and/or an overload in work that's caused burnout. A smooth transition from one leader to the next is crucial for the success and the survival of the chapter; unsuccessful board transitions can lead to chapter collapse.

Many organizations don't have a smooth leadership transition process. Their boards aren't ready to handle what happens when one member leaves and another steps in, and the new leader isn't fully aware of the breadth of their new responsibilities.

A checklist helps ensure they understand the expectations of the role they're stepping into, while reducing the risks and uncertainty that can come with transitions. These will direct your board members as they transition in and out of roles, while ensuring the necessary expertise transfers to the person taking over.

- President
- Treasurer
- Membership
- Programming
- Communication

Board transitions are opportunities to reinvigorate a chapter, get members involved, increase membership, boost event attendance, and build financial stability. When handled properly, transitions can be a great step toward building a strong organization for years to come.

1. ROLES AND RESPONSIBILITIES OF POSITIONS

https://www.starchapter.com/downloads/roles_and_responsibilities.pdf

2. BOARD TRANSITION CHECKLIST

https://www.starchapter.com/downloads/board_transition_checklist.pdf

3. EXIT INTERVIEW GUIDELINES

https://www.starchapter.com/downloads/exit_interview_guidelines.pdf

CONCLUSION

StarChapter is dedicated to educating and empowering chapter leadership while strengthening the association as whole.

These templates may lead you to think of others you'd like to see. Send your suggestions to marketing@starchapter.com.

StarChapter is a member-friendly association software company serving local chapters of professional and trade associations in the United States and Canada. StarChapter's mission is to help local leaders grow their chapter's attendance, membership, and revenue. The software combines event registration, membership management, email marketing, mobile friendly website layouts, eCommerce, and web services. Board members have access to StarChapter Advisors, online support, 24/7 ticket administrators, phone support, and ongoing board training webinars. StarChapter continually provides resources to help local leaders succeed with chapter management insights.